

## Application for Certification as a Legal Specialist

Congratulations on your successful results on the legal specialization examination. You have completed a major portion of the certification process. The next and final step involves completing this application for review by the Board of Legal Specialization. Should you have any questions as you are filling out this application, please do not hesitate to contact the Department of Legal Specialization at 415-538-2120 or [legalspec@calbar.ca.gov](mailto:legalspec@calbar.ca.gov).

The deadline for submission of this application is **APRIL 25, 2013**.<sup>1</sup>

- MAIL YOUR APPLICATION TO: THE CALIFORNIA BOARD OF LEGAL SPECIALIZATION, STATE BAR OF CALIFORNIA, 180 HOWARD STREET, SAN FRANCISCO, CA 94105-1639.
- PLEASE INCLUDE THE \$300 CERTIFICATION APPLICATION FEE
- YOU MAY FIND IT HELPFUL TO REFER TO THE ENCLOSED RULES AND STANDARDS AS YOU COMPLETE THE APPLICATION AND ATTACHMENTS. THESE ARE LOCATED AT [WWW.CALIFORNIASPECIALIST.ORG](http://WWW.CALIFORNIASPECIALIST.ORG) UNDER YOUR PARTICULAR LEGAL SPECIALTY AREA.
- COPIES OF THIS APPLICATION CAN ALSO BE FOUND AT [WWW.CaliforniaSpecialist.org](http://WWW.CaliforniaSpecialist.org).

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
THE APPLICATION IS REVIEWED FOR COMPLETENESS BY STATE BAR STAFF	EDUCATION IS VERIFIED	INDEPENDENT & REVIEW (II&R) BEGINS	APPLICATION FORWARDED TO ADVISORY COMMISSION FOR REVIEW AND RECOMMENDATION	RECOMMENDATION FORWARDED TO BOARD OF LEGAL SPECIALIZATION FOR ACTION

The certification process takes an average of **six** months from the date of your application. During this time, references will be requested, and the application will be reviewed by staff, by an advisory commission of professionals in your field, and by the State Bar of California Board of Legal Specialization.

After the Department of Legal Specialization has confirmed receipt of your application, you will be contacted if any portion of the application appears incomplete or if the Board has any questions about your application. When the certification decision is made, you will be notified by letter to your address of record on your State Bar Profile.

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<sup>1</sup> You may request a discretionary extension of time from the California Board of Legal Specialization if needed. Please do so in writing and mail to the address above, stating good cause for the extension and a date certain by which you will file the application. Results are valid for three years from the date of the examination. Extensions cannot be granted beyond that date without submitting more recent examination results.

Questions? Contact us at [Legalspec@calbar.ca.gov](mailto:Legalspec@calbar.ca.gov) or at 415.538.2120.

## How to Avoid Delays

### Step 1 The Application is Reviewed for Completeness

If attachments are missing or incomplete, you will be notified.

### Step 2 Education is Verified

Have you completed 45 hours of education in your specialty area or equivalent MCLE or scholarly articles? Enclose proper certificates of completion or a description of scholarly articles or publications.

#### INSTRUCTIONS FOR ATTACHMENT B-1:

**Approved education activities** are activities either individually approved for legal specialist credit or sponsored by approved legal specialist providers. Providers of approved legal specialist activities are subject to the same reporting requirements as MCLE providers, and must provide you with a certificate of attendance indicating that the activity was approved for legal specialist credit and stating the number of hours of credit you received.

- **If you attend the program**, include with Attachment B-1 a copy of the certificate of attendance that the program sponsor is required to give you. If you need a copy of a certificate, contact the provider, who is required to keep a record of your attendance. If you need a copy of a certificate from a State Bar Sections program, call 415-538-2210.
- **If you were a speaker or taught the program**, include with Attachment B-1 sufficient documentation to verify it (the list of instructors, a letter or certificate from the provider, etc.). As a speaker, you may claim 4 hours of credit for each hour of speaking time (first time only – credit for repeat presentations is limited to speaking time only).

#### INSTRUCTIONS FOR ATTACHMENT B-2:

**Programs not previously approved for legal specialist credit** will be reviewed by the Advisory Commission. Enclose sufficient information for the Advisory Commission to determine whether credit should be granted (i.e., promotional materials, a brief description of the program, course outline, list of instructors).

#### INSTRUCTIONS FOR ATTACHMENT B-2:

**Alternate education activities** must be reviewed and approved by the Advisory Commission, unless they are audio-visual reproductions of approved programs. Enclose sufficient information for the Advisory Commission to determine whether the activity is eligible for credit (i.e., promotional materials, a brief description of the program, course outline, and/or list of instructors).

### Step 3 Independent Inquiry and Review (II&R)

**Reference** forms are mailed to the individuals you have listed on Attachment C, all of whom must be attorneys. You are encouraged to submit more than the minimum number of references to speed processing of your application.

#### INSTRUCTIONS FOR ATTACHMENT C (References):

The primary references you provide us are asked to submit two additional names of individuals familiar with your proficiency in the specialty area in which you are seeking certification. If your primary references have not responded, you will be notified.

Questions? Contact us at [Legalspec@calbar.ca.gov](mailto:Legalspec@calbar.ca.gov) or at 415.538.2120.

*Delays are caused by:*

- ✓ **References who are not correctly identified.** Be sure to include each reference's State Bar membership number so that the form is sent to the correct person; some attorneys and judges have similar or identical names. The use of nicknames, incorrect last names (for example, as a result of a change in marital status), or illegible handwriting may result in delays. Bar numbers can be found at [www.calbar.ca.gov](http://www.calbar.ca.gov) under Attorney Search.
- ✓ **Ineligible references:** a relative, client, current partner, current associate, current employer or current employee. An associate is defined as an attorney who works in the same firm as the applicant.
- ✓ **References who do not respond quickly or at all.** Make sure the references you provide know that we will be sending them a form and encourage them to return it promptly.
- ✓ **References who decline to comment** for various reasons, such as a reference who is not familiar enough with your work to comment on your proficiency.

#### **INSTRUCTIONS FOR REPORTING DISCIPLINE:**

At numbers 9.a and 9.b on the application form, you are required to disclose any attorney or other professional discipline against you by the State Bar of California or other authority authorized to impose professional discipline in California, or in any other state or jurisdiction, including foreign jurisdictions, AND any pending discipline. [for *Immigration and Nationality Law*, also include the Board of Immigration Appeals; for *Bankruptcy Law*, also include any bankruptcy courts; for *Workers' Compensation Law*, also include any workers' compensation forum; for *Taxation Law*, also include the Internal Revenue Service.]

For attorney discipline, list all instances of discipline in which the sanction imposed was public reproof or greater. Include (1) title of disciplinary action (2) action number (3) nature of charge (4) nature of sanction (5) date sanction was imposed and (6) date sanction was terminated. For non-attorney professional discipline (e.g., accountancy), provide information similar to the above.

#### **Step 4 Application is Forwarded to Advisory Commission for Review**

The Advisory Commission, after reviewing your employment history, the task and experience attachment(s), your references, discipline (if any), education programs not previously approved, and alternate education activities, may take any of the following actions:

- Recommend Certification – the application proceeds to Step 5.
- Request Additional Information
- Recommend Denial – You will be notified and given the option of providing additional information or withdrawing your application.

#### **Step 5 Recommendations for Certification or Denial are Forwarded to the Board of Legal Specialization for Action**

The Board of Legal Specialization reviews the recommendations of the Advisory Commission and may take any of the following actions:

- Grant Certification
- Request Additional Information from the Advisory Commission
- Recommend Denial – You will be notified and given the option of providing additional information or withdrawing your application before the Board action becomes final.

Questions? Contact us at [Legalspec@calbar.ca.gov](mailto:Legalspec@calbar.ca.gov) or at 415.538.2120.

**Fees**

A \$300 fee is required for the processing of this application. The Legal Specialization program is non-profit and required to be self-funding. The annual fee is used for the maintenance and promotion of the program. You may enclose a check payable to “The State Bar of California” or include the credit card authorization to pay by Visa or MasterCard.

**Mailing Address**

All correspondence is sent to you at your official address of record registered on your State Bar Profile. You can change your address online at [www.calbar.ca.gov](http://www.calbar.ca.gov) using My State Bar Profile.

**Questions?** Contact the Department of Legal Specialization at 415-538-2120 or [legalspec@calbar.ca.gov](mailto:legalspec@calbar.ca.gov) or visit our website, which can be reached by any of the following three methods:

- [www.californiaspecialist.org](http://www.californiaspecialist.org)
- [ls.calbar.ca.gov](http://ls.calbar.ca.gov)
- [www.calbar.ca.gov](http://www.calbar.ca.gov) → then choose quick link Legal Specialists

**INCLUDED IN THIS PACKET:**

Instructions

Credit Card Payment Form (Check, Visa and MasterCard accepted)

Application for Certification

**CHECKLIST**

Have you:

- Read the declaration included in the application?
- Signed and dated the application?
- Provided all information requested on the application and attachments?
- Enclosed all attachments?
- Attached additional sheets if you needed more space?
- Put your name and your bar number on the top of all attachments?
- Enclosed the required fee via credit card or check payable to The State Bar of California?
- Made copies for you records?

Questions? Contact us at [Legalspec@calbar.ca.gov](mailto:Legalspec@calbar.ca.gov) or at 415.538.2120.



# The State Bar of California Board of Legal Specialization Credit Card Authorization Form

## Applicant Information

Bar Number: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## Credit Card Information

Visa

MasterCard

Only Visa and MasterCard credit cards are accepted. If you prefer, you may pay by check payable to "The State Bar of California," rather than filling out this credit card authorization form.

Credit Card Number: \_\_\_\_\_

Expiration Date (Month/Year): \_\_\_\_\_

Name on Card: \_\_\_\_\_

Billing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

By my signature on this document, I hereby authorize The State Bar of California to charge my Visa or MasterCard account for the amount that I have entered in the "total" box below.

Description	Amount Paid
Post-Examination Application Fee per Certified Specialty - \$300	\$

THE CALIFORNIA BOARD OF  
 LEGAL SPECIALIZATION  
 The State Bar of California  
 180 Howard Street  
 San Francisco, CA 94105-1639  
 (415) 538-2120  
 legalspec@calbar.ca.gov

**State Bar of California Program for Certifying  
 Legal Specialists**

**C-O-N-F-I-D-E-N-T-I-A-L**

**APPLICATION FOR CERTIFICATION  
 Franchise and Distribution Law Specialist**

**09**

For Office Use Only  
 Legal Specialization \_\_\_\_\_

**PLEASE PRINT OR TYPE. CHECK ALL BOXES THAT APPLY.**

1. Name & Address (exactly as they appear on State Bar membership records)	2. Bar Number
	3. Daytime Phone Number (     )
	4. E-mail Address

5. I passed the Legal Specialist Examination held in \_\_\_\_\_ Month \_\_\_\_\_ Year

Note: This application is only for applicants/attorneys that have passed the Legal Specialization specialty examination. If you have not taken the examination, please register at [www.californiaspecialist.org](http://www.californiaspecialist.org).

6. I am admitted to practice law in the following states(s):	7. At the time of application for certification, I am an active member of the State Bar of California. I have been engaged in the practice of law continuously during the five years immediately preceding the submission of [this] application for certification and, in <u>each</u> of those years, have practiced franchise and distribution law for at least 25% of the time spent in my occupational endeavors.							
<table border="1"> <thead> <tr> <th><u>State</u></th> <th><u>Date Admitted</u></th> </tr> </thead> <tbody> <tr> <td><u>CA</u></td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> </tbody> </table>		<u>State</u>	<u>Date Admitted</u>	<u>CA</u>	_____	_____	_____	_____
<u>State</u>	<u>Date Admitted</u>							
<u>CA</u>	_____							
_____	_____							
_____	_____							

Yes    No

**IF NO, STOP HERE.** You are not eligible to apply.

8. The following is a complete statement of my employment since my admission to practice law: LIST MOST RECENT EMPLOYMENT FIRST. ATTACH SEPARATE SHEET IF NECESSARY.    **CHECK HERE IF ADDITIONAL SHEETS ARE ATTACHED.**

Dates of Employment	Employer	Employer's Address	Nature of Employment (summarize nature of work performed)

9. Since your admission to the State Bar of California:

- a. Have you been disbarred, suspended or disciplined by the State Bar of California or similar attorney disciplinary authority or any other authority that imposes professional discipline in California, or in another state or jurisdiction, including a foreign jurisdiction?  Yes  No
- b. Do you have any discipline pending?  Yes  No
- c. Have you had any felony convictions?  Yes  No
- d. Did you resign from any bar, court or body before whom you appear?  Yes  No
- e. Have there been three or more judgments of professional negligence against you? *(If yes, please attach the relevant documents.)*  Yes  No
- f. Have any sanctions, other than discovery sanctions, been entered against you by any court or body before whom you appear?  Yes  No
- g. Have any findings of contempt been made against you by any court or body before whom you appear?  Yes  No
- h. Have you been denied certification or recertification as a legal specialist by the State Bar of California Board of Legal Specialization, or any other certifying body?  Yes  No

**IF YOU ANSWER YES TO ANY OF THE ABOVE, YOU MUST PROVIDE FULL DETAILS ON A SEPARATE SHEET. A record of discipline or failure to disclose any of the information requested above may constitute grounds for denial of your application.**

**DECLARATION**

I hereby authorize all educational institutions, governmental agencies and instrumentalities (including bar associations and bar examiners of other jurisdictions), employers and business and professional associates (past and present), to release to the California Board of Legal Specialization and the Franchise and Distribution Law Advisory Commission any nonprivileged information, files or records requested by them for the purpose of processing this application. The foregoing release does not apply to matters communicated by me in confidence to any lawyer, spouse, physician, psychotherapist or clergy person for which I have privilege of nondisclosure under the provisions of Chapter 4, Division 8 of the California Evidence Code.

I further authorize the Franchise and Distribution Law Advisory Commission to conduct independent inquiry and review as provided in section 9.0 of the Rules.

I agree to pay all fees required by the California Board of Legal Specialization when due.

I agree to abide by all rules and regulations of the California Board of Legal Specialization as amended from time to time and to furnish to the Board and the Franchise and Distribution Law Advisory Commission such information as they may require to determine my entitlement to certification.

I am the applicant herein for certification as a franchise and distribution law specialist under the State Bar of California Program for Certifying Legal Specialists. I fully understand that failure to make a truthful disclosure of any fact, item or information required may result in the denial of my application, revocation of my certificate of specialization, or disciplinary action by the State Bar of California. I have carefully read and answered each question completely and truthfully in the foregoing application and any attachments hereto, and certify that the information therein is true and correct to the best of my knowledge.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on:

Date: \_\_\_\_\_

Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_

**TASK AND EXPERIENCE REQUIREMENT**

**ATTACHMENT A**

Applicant Name: \_\_\_\_\_ Bar Number: \_\_\_\_\_

**The Franchise and Distribution Law Advisory Commission may require additional evidence of completion of tasks and experience as indicated in this Attachment A.**

**Within the five years immediately preceding submission of this application,** I have been substantially involved in the practice of franchise and distribution law as demonstrated by performance of the tasks listed below (see section 2.0 of the Standards for a definition of “substantial involvement”):

**You must submit a total of at least 100 points.** Points may be accumulated from any of the tasks, subject to the maximums specified per task.

**CHECK ALL BOXES THAT APPLY.**

**EACH TASK MAY BE COUNTED IN ONLY ONE CATEGORY.**

**NOTE:** For each section below in which you claim 20 or more points, provide a brief narrative statement summarizing your experience in that area and include the statement as Attachment A-1. We do not expect you to violate any client confidentiality or privilege in doing so; however, to the extent that you can identify your professional activities that are not confidential (e.g., captions of cases, franchise registration applications or trademark applications in which you are listed as counsel of record, etc.), the verification of your professional experience and the processing of your application can be expedited. Your statement will be deemed part of your application.

SECTION	DESCRIPTION	NUMBER OF MATTERS	NUMBER OF POINTS CLAIMED
2.1	Representing the franchisor in the structuring of a franchise program, including the drafting of the franchise agreement and related documentation (including any disclosure documents required by law): 5 points per franchise program. <b>Maximum number of points in this category: 35</b>		
2.2	Representing the supplier in the structuring of a distribution program other than a franchise program, including the drafting of the distribution agreement and related documentation: 5 points per distribution program. <b>Maximum number of points in this category: 35</b>		
2.3	Preparing and filing of (i) regulatory applications for initial registration, or (ii) substantive applications for renewal, or (iii) substantive post-effective amendments of a franchise program. Individual applications and applications for coordinated review may be used to satisfy this requirement. 5 points per separate program. <b>Maximum number of points in this category: 35</b>		
2.4	Representing a current or prospective franchisee or franchisor in connection with the acquisition or transfer of a new or existing franchise. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		
2.5	Representing a current or prospective distributor in connection with the acquisition or transfer of a new or existing distribution agreement. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		

SECTION	DESCRIPTION	NUMBER OF MATTERS	NUMBER OF POINTS CLAIMED
2.6	Representing the seller or purchaser, with respect to the franchise or distribution law issues, in a merger or acquisition involving a franchise or distribution program consisting of at least 10 franchisees or distributors, in a single or related series of transactions. 5 points per each separate acquisition. <b>Maximum number of points in this category: 35</b>		
2.7	Providing substantive written legal advice or analysis regarding the application or non-application of the franchise or distribution laws in the United States in connection with a commercial relationship. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		
2.8	Providing substantive written legal advice or analysis regarding the applicable franchise or distribution laws in connection with a cross-border franchise or distribution matter or transaction which is inbound to or outbound from the United States. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		
2.9	Providing substantive written legal advice or analysis regarding the cancellation, termination or non-renewal of a franchise or distribution agreement. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		
2.10	Providing substantive written legal advice or analysis to associations of franchisees or distributors, or assisting in negotiations on behalf of any associations of franchisees or distributors, in connection with franchise or distribution law matters. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		
2.11	Providing substantive written legal advice or analysis involving antitrust or unfair competition law issues relating to franchise or distribution relationships. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		
2.12	Providing substantive written legal advice or analysis involving advertising or consumer protection law issues relating to franchise or distribution relationships. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		
2.13	Representing a party in litigation as its principal attorney where matters of franchise or distribution law are among the main contested issues. 5 points per separate litigation case if at least 250 hours are billed by the attorney on the case; 10 points per separate litigation case if at least 500 hours are billed by the attorney on the case; or 15 points per separate litigation case if at least 750 hours are billed by the attorney on the case. <b>Maximum number of points in this category: 60</b>		
2.14	Preparing or opposing a motion for summary judgment or other dispositive motion in litigation where matters of franchise or distribution law are among the main contested issues. 5 points per separate litigation case. <b>Maximum number of points in this category: 35</b>		
2.15	Preparing briefs in litigation on appeal to any appellate court where: (i) the attorney is the principal attorney responsible for authoring the brief(s); and (ii) matters of franchise or distribution law are among the main issues on appeal. 5 points per separate litigation case. <b>Maximum number of points in this category: 35</b>		

SECTION	DESCRIPTION	NUMBER OF MATTERS	NUMBER OF POINTS CLAIMED
2.16	Conducting the principal oral argument before any appellate court for litigation on appeal where matters of franchise or distribution law are among the main issues in the oral argument. 5 points per separate litigation case. <b>Maximum number of points in this category: 35</b>		
2.17	Acting as the principal attorney in devising and implementing the litigation strategy in connection with pending or threatened litigation where matters of franchise or distribution law are expected to be among the main contested issues. 5 points per separate litigation case. <b>Maximum number of points in this category: 35</b>		
2.18	Representing a party in a formal mediation as its principal attorney where matters of franchise or distribution law are among the main contested issues. 5 points per separate formal mediation case. <b>Maximum number of points in this category: 35</b>		
2.19	Acting as the principal attorney in devising and implementing a formal compliance program for a client following the entry of a court order or other binding order or award against the client in any litigation where matters of franchise or distribution laws are among the main issues. 5 points per separate litigation case. <b>Maximum number of points in this category: 35</b>		
2.20	Acting as an expert witness or legal consultant in litigation where matters of franchise or distribution law are among the main contested issues. 5 points per separate litigation case. <b>Maximum number of points in this category: 35</b>		
2.21	Acting as a judge, arbitrator or mediator in any litigation or formal mediation where matters of franchise or distribution law are among the main contested issues. 5 points per separate litigation or mediation case. <b>Maximum number of points in this category: 35</b>		
2.22	Providing substantive written legal advice or analysis regarding other material issues concerning a franchise or distribution relationship not otherwise covered above. 5 points per matter or transaction. <b>Maximum number of points in this category: 35</b>		
	<b>TOTAL</b>		(minimum 100 pts)

**APPLICANT: PLEASE READ BEFORE COMPLETING  
THE EDUCATION PORTION OF YOUR APPLICATION**

Because Franchise and Distribution Law is a new specialty, no education providers or individual activities have been approved yet for legal specialization credit. To receive specialization approval for an education activity, providers must meet the following criteria outlined in section 7.3 of the Rules Governing the State Bar of California Program For Certifying Legal Specialists:

- 7.3.1 The content of the activity must be relevant to the specialty or related fields.
- 7.3.2 The curriculum must provide a level of education required to achieve or maintain proficient practice in the specialized area of law. In determining whether the activity is so designed, the type of advertising employed by the sponsor will be considered.
- 7.3.3 The instructors must be qualified experts in the field in which they are teaching.
- 7.3.4 Where the activity is more than one (1) hour in length, substantive written materials must be distributed to the participants at or before the activity.

To help you complete your application, we are providing a list of education providers that have in the past provided programs in Franchise and Distribution Law or a related field. If you have taken courses offered by these providers that meet the above criteria, they may be used to satisfy the 45-hour requirement for certification subject to the approval of the Advisory Commission. To submit such courses, use **Attachment B-2** of the certification application. ***(NOTE: You are not limited to courses offered by these providers; this list is meant only as a guide. Courses offered by other providers may also be used as long as they meet the above criteria.)***

ALI-ABA	International Franchise Association – Legal Symposium-International Section
American Bar Association (ABA) - Intellectual Property Law Section - Antitrust Law Section - Business Law Section - Forum Committee on Franchising	Licensing Executive
American Corporate Counsels Association (ACCA)	Local Bar Associations
Continuing Education of the Bar (CEB)	Sections Education Institute - State Bar of California - Business Law Section - Intellectual Property Law Section
Direct Marketing Association	Practicing Law Institute (PLI)
International Bar Association (IBA)	U. S. Trademark Association

**EDUCATION REQUIREMENT**

**ATTACHMENT B  
Total Educational Reporting**

Applicant Name: \_\_\_\_\_ Bar Number: \_\_\_\_\_

In order to satisfy the education requirement for certification, you must have completed at least 45 hours of approved education as specified in section 3.0 of the Standards ***within the three years immediately preceding submission of this application.*** One-half, or 22.5 hours, may be satisfied with alternative educational activities as described in section 6.2 of the Rules.

**REMEMBER:** Courses taken to fulfill the MCLE special topic requirements (legal ethics, substance abuse/mental distress, elimination of bias in the legal profession) CANNOT be used to satisfy the education requirement for certification, although a course in legal ethics that relates specifically to your specialty area may qualify.

**ON ATTACHMENT B-1**, list the educational activities you have attended or taught (excluding alternative educational activities) that were specifically approved for legal specialist credit. Refer to Attachment B-1 for the type of documentation required.

**ON ATTACHMENT B-2**, list the educational activities you have attended or taught (excluding alternative educational activities) that were not specifically approved for legal specialist credit. Refer to Attachment B-2 for a further explanation and the type of documentation required.

**ON ATTACHMENT B-3**, list any alternative educational activities (section 6.2 of the Rules) that you have completed to satisfy the education requirement. Keep in mind that, with the exception of approved tapes, hours claimed for alternative educational activities are subject to approval by the Advisory Commission.

**Summarize your hours in the grid provided below.**

**SUMMARY OF EDUCATION ACTIVITIES (INCLUDING ALTERNATIVES)**

<b>HOURS ATTENDED OR TAUGHT (total from B-1 + B-2)</b>	<b>HOURS OF ALTERNATIVE EDUCATION (total from B-3)</b>	<b>TOTAL (minimum of 45 hours)</b>

**EDUCATION REQUIREMENT**

**ATTACHMENT B-1  
Education Approved for Legal Specialist Credit**

Applicant Name: \_\_\_\_\_ Bar Number: \_\_\_\_\_

On this attachment, list the educational activities you have attended or taught (excluding alternative educational activities as described in section 6.2 of the Rules) that were specifically approved for legal specialist credit. Providers of approved legal specialist activities are subject to the same requirements as MCLE providers, so you should have been provided with a **certificate of attendance** indicating that the activity was approved for legal specialist credit and stating the number of hours of credit you received.

**COPY THIS ATTACHMENT IF ADDITIONAL SPACE IS NEEDED.**

**DOCUMENTATION REQUIRED FOR EACH ACTIVITY:** certificate of attendance. The provider is required to give you a certificate of attendance. If you did not receive a certificate, contact the provider.

NAME OF PROGRAM SPONSOR OR APPROVED PROVIDER	NAME OF PROGRAM	HOURS ATTENDED	HOURS TAUGHT	DATE COMPLETED
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	

\*Calculate credit for teaching as follows: Next to **HOURS**, put the actual number of hours of speaking time. Check the appropriate box to indicate whether it was your first time presenting the activity or a repeat presentation. If it was the first time, multiply the actual speaking time by 4 and put the result next to **TOTAL**. If it was a repeat presentation, you may claim only actual speaking time. In that case, **HOURS** and **TOTAL** will be the same number.

**EDUCATION REQUIREMENT**

**ATTACHMENT B-2  
Education Approved for MCLE Credits Only**

Applicant Name: \_\_\_\_\_ Bar Number: \_\_\_\_\_

On this attachment, list the educational activities you have attended or taught (excluding alternative educational activities as described in section 6.2 of the Rules) that were NOT specifically approved for legal specialist credit but that you believe meet the criteria for approval of educational activities set forth in section 7.3 of the Rules.

**COPY THIS ATTACHMENT IF ADDITIONAL SPACE IS NEEDED.**

**DOCUMENTATION REQUIRED FOR EACH ACTIVITY:** Sufficient information for the Advisory Commission to determine whether credit should be granted (for example, promotional materials, a brief description of the program, course outline, list of instructors).

NAME OF PROGRAM SPONSOR	NAME OF PROGRAM	HOURS ATTENDED	HOURS TAUGHT	DATE COMPLETED
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	
			_____ HOURS <input type="checkbox"/> 1ST TIME <input type="checkbox"/> REPEAT _____ TOTAL*	

\*Calculate credit for teaching as follows: Next to **HOURS**, put the actual number of hours of speaking time. Check the appropriate box to indicate whether it was your first time presenting the activity or a repeat presentation. If it was the first time, multiply the actual speaking time by 4 and put the result next to **TOTAL**. If it was a repeat presentation, you may claim only actual speaking time. In that case, **HOURS** and **TOTAL** will be the same number.

**EDUCATION REQUIREMENT**

**ATTACHMENT B-3  
Alternative Education**

Applicant Name: \_\_\_\_\_ Bar Number: \_\_\_\_\_

On this attachment, list the alternative methods you used to satisfy the education requirement. Remember that no more than one-half (1/2) of your requirement can be satisfied in this manner. SEE SECTION 6.2 OF THE RULES FOR LIMITATIONS ON ALTERNATIVE METHODS TO SATISFY THE EDUCATIONAL REQUIREMENT.

If you are submitting activities that require Advisory Commission approval, we recommend that you **SUBMIT YOUR APPLICATION NO LATER THAN FOUR MONTHS PRIOR TO THE DEADLINE.**

*The Advisory Commission may require additional information regarding alternative education activities.*

<b>ALTERNATIVE EDUCATION</b>	<b># HOURS REQUESTED</b>
1. Self-verified listening to and/or viewing of a complete audio or audio/visual reproduction of an approved program or program segment. <b>Such tapes must be approved for educational credit and listened to or viewed within the time period for which they were approved. <u>YOU MUST ATTACH A LIST OF YOUR SELF-STUDY ACTIVITIES.</u></b>	
2. Self-verified participation in other approved audiovisual activities, including interactive video instruction and activities electronically transmitted from another location, such as online education. <b><u>YOU MUST ATTACH A LIST OF YOUR SELF-STUDY ACTIVITIES.</u></b>	
3. Writing or editing published articles or books relating to franchise and distribution law. <b>PLEASE SUBMIT A COPY OF THE MATERIALS FOR WHICH YOU ARE CLAIMING CREDIT. The hours of credit to be allowed shall be determined by the Commission after consideration of the amount and quality of the submitted materials.</b>	
4. Teaching a course in the field of franchise and distribution law at an accredited institution of higher education. <b>The hours of credit to be allowed shall be determined by the Commission based upon the amount and quality of professional education involved.</b>  NAME OF INSTITUTION:  NAME OF COURSE:  BRIEF DESCRIPTION:  TO WHOM THE COURSE WAS TAUGHT:  DATE COMPLETED:	
5. Completion of an advanced postgraduate course at an accredited law school that includes education in franchise and distribution law. <b>The hours of credit to be allowed shall be determined by the Commission based upon the amount and quality of professional education involved.</b>  NAME OF LAW SCHOOL:  COURSE COMPLETED:  DATE COMPLETED:	

**INDEPENDENT INQUIRY AND REVIEW**

**ATTACHMENT C**

Applicant Name: \_\_\_\_\_ Bar Number: \_\_\_\_\_

I submit the names and addresses of a minimum of three attorneys or judges who have had an opportunity to observe my work and who can attest to my proficiency in the practice of franchise and distribution law.

**The references do not include any attorney who is my close relative or who currently is my client, partner, associate, employer or employee.**

**All references, communications, reference forms, and information gathered pertaining to the applicant shall be the property of the State Bar and are confidential and no information concerning them and the matter to which they relate shall be given to any person except upon prior order of the Board of Trustees of the State Bar or as provided in the Rules and Regulations.**

*Include each reference's California bar membership number to insure that reference forms are sent promptly and to the right individual. Bar membership numbers can be found online at [www.calbar.ca.gov](http://www.calbar.ca.gov) under Attorney Search.*

NAME AND BAR NUMBER	ADDRESS
1.	
2.	
3.	
4.	
5.	